DOCUMENT RESUME

ED 253 239 IR 051 002

TITLE	The University of North Carolina at Chapel Hill Public Services Study Report. One of a Series of Self-Studies and Research Projects. Final Report.
INSTITUTION	Association of Research Libraries, Washington, D.C. Office of Management Studies.; North Carolina Univ., Chapel Hill.
SPONS AGENCY	General Electric Foundation, Ossining, N.Y.
PUB DATE	[Nov 84]
NOTE	47p.; Report issued by the Academic Affairs Library.
AVAILABLE FROM	Association of Research Libraries, Office of Management Studies, 1527 New Hampshire Avenue NW, Washington, DC 20036 ($15.00 per copy prepaid).
PUB TYPE	Viewpoints (120) -- Reports - Evaluative/Feasibility (142)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Academic Libraries; Higher Education; *Information Needs; Information Services; *Library Administration; Library Automation; Library Materials; Library Personnel; *Library Planning; Library Research; *Library Services; Position Papers; Research Libraries; *Self Evaluation (Groups)
IDENTIFIERS	*University of North Carolina Chapel Hill

ABSTRACT

This final report completes a self-study begun in August 1983 by the University of North Carolina at Chapel Hill Academic Affairs Library to provide an opportunity for staff to lay the groundwork for services within a new facility. Broad areas identified for study were: effectiveness of services to users, coordination of public services throughout the system, organizational changes within the public services division, programmatic and budgetary priorities, and working relationships between the public services division units and units of other divisions. Task Forces worked in the areas of Internal Communication; Organization, Management, and Staffing; Technology and Public Services; and User Needs, Service Performance, and the Promotion of Public Services. During the self-study, which included a survey of 1,100 library users, over 200 draft recommendations were suggested; and 66 final recommendations are included in this report. The report also includes the director's charge and a one-page introduction. Recommendations are arranged according to the following topics: Communication; Committee System in General; Planning and Coordinating Groups; and Specific Departments and Areas--Planning and Coordination, Staffing, Staff Development and Training, Public Service Policies, Referrals, Microcomputers, Copying Equipment, Access to the Collection, and Issues for Further Review and Study. Task Force reports are available separately from the Association of Research Libraries. (THC)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

OFFICE OF MANAGEMENT STUDIES

ASSOCIATION OF RESEARCH LIBRARIES 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036 • (202) 232-8656

EXPLANATORY NOTES ON THIS PUBLICATION SERIES

Final reports from self-studies and research projects of the Public Services Study sponsored by the General Electric Foundation and administered by the Office of Management Studies, Association of Research Libraries, are made available within this publication series as they are issued by libraries during 1984-85.

This report was issued by the Academic Affairs Library at the University of North Carolina at Chapel Hill, at the conclusion of its Public Services Study. Appendices that include Task Force Reports will be photocopied upon demand, for the prices indicated below:

Task Force on Organization, Management, and Staffing	110 pages	$20.00
Task Force on User Needs, Service Performance, and the Promotion of Public Services	100 pages	$20.00
Task Force on Internal Communication	103 pages	$20.00
Task Force on Technology and Public Services	50 pages	$15.00

* * * *

Additional copies of this Final Report are available for $15.00. All materials require prepayment, with checks made payable to "ARL Office of Management Studies." Please specify exactly which reports you are ordering by title and refer to the University of North Carolina Public Services Study. Send orders and checks to: Office of Management Studies, 1527 New Hampshire Ave., N.W., Washington, D.C. 20036. Outside the U.S. and Canada, add $5.00 per order for postage and handling.

ASSOCIATION OF RESEARCH LIBRARIES 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036 • (202) 232-8656

THE PUBLIC SERVICES STUDY

Academic libraries today face the fundamental challenge of responding more effectively to the information needs of their users in a period of increased information resources and decreased or stabilized economic resources. In this environment, academic libraries must move toward the wisest use of their resources in identifying and serving the changing needs of users, in becoming more active partners in the instructional and research interests of their universities, and in more actively facilitating the transfer of information from locations beyond their walls to their own clientele. The challenge includes the need to take advantage of new and emerging capabilities such as on-line bibliographic search services, new catalog formats, and microform and non-print publishing media.

To address this set of concerns, the Office of Management Studies has developed the Public Services Study, which individual academic libraries can use to assess and improve their current services programs. The study is based upon the premise that academic libraries are experiencing a number of fundamental internal and external pressures that create a need to review priorities and develop new approaches to change. The goals of this study include:

*to provide tools to libraries enabling them to determine and analyze user patterns, needs, and satisfaction levels;

*to provide assistance to libraries in relating the use of the library to current operating services policies and practices;

*to design performance measures that can be applied in evaluating current services programs and in planning improvements;

*to provide guidelines for libraries to use in designing new services activities or remodeling current ones;

*to suggest improved methods for promoting the use of library services and enhancing the role of the library on the campus.

The basic strategy employed in the Public Services Study is assisted self-study. While assisted self-study resembles traditional self-studies in some respects, it differs on three important dimensions. First, assisted self-study involves collecting information and then analyzing it within a framework as first steps toward improvement. Second, assisted self-study promotes the learning and development of all persons involved through their experiences in conducting the study. This means that the staff develops a broader understanding of the impact of services concerns on the ability of the library to meet its obligation to users. And third, libraries participating in assisted self-study receive specialized resource materials, training, and consultation assistance usually not provided in traditional studies. This ensures timely efficient execution of what can be a demanding complex activity.

In accordance with its problem-solving philosophy, assisted self-study employs a group approach to analysis, using library staff, faculty, students, and institutional officials. Two types of groups are involved, a study team and task forces. Primary responsibility rests with the study team, which defines the scope of the study, sets goals, plans, organizes and conducts analyses, draws final conclusions, and designs the implementation program. The study team also creates the task forces to assist in collecting and analyzing data and in developing options for resolving problems. The task forces are responsible to the study team and their work is coordinated by the team.

The major components of the study are a general situational analysis, and specific modules on description and inventory of services, management of services, assessment of services needs and performance, and interaction with the environment. Data gathering and analysis is conducted within each of these components. Then, a final action planning stage creates recommendations, implementation strategy, and the final report. The entire study takes 9 to 12 months. Individual modules can be conducted in less time.

The study is being made available as a part of the Academic Library Program, which is used by libraries willing to commit staff time and some financial resources to the process of assisted self-study. The program draws upon several previous studies developed and operated by the Office of Management Studies including the Management Review and Analysis Program (MRAP), the Collection Analysis Project (CAP), the Academic Library Development Program (ALDP), the Planning Program for Small Academic Libraries, and the Preservation Planning Program.

Financial and/or design support has come from the General Electric Foundation and from members of the Association of Research Libraries (ARL), a non-profit educational organization of 117 major research libraries in the United States and Canada.

PREPARED BY OMS STAFF
August 1984

OFFICE OF MANAGEMENT STUDIES

ASSOCIATION OF RESEARCH LIBRARIES 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036 • (202) 232-8656

November 1984

EXECUTIVE SUMMARY

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL ACADEMIC AFFAIRS LIBRARY PUBLIC SERVICES IN RESEARCH LIBRARIES FINAL REPORT OF THE STUDY TEAM

The Public Services in Research Libraries Self-Study at the University of North Carolina at Chapel Hill Academic Affairs Library involved 38 staff serving on one Study Team (Karen S. Seibert, chairperson) and four Task Forces. Employing OMS consultants Patricia K. Swanson and Shirley Hallblade, the study began in August 1983 and was completed with this Final Report in October of 1984. According to a charge from Library Director James F. Govan, the self-study provided staff an opportunity to lay the groundwork for services within a new facility, and to identify a proper balance of "the traditional and the new."

The broad areas identified for study were: effectiveness of services to users, coordination of public services throughout the system, organizational changes within the public services division, programmatic and budgetary priorities, and working relationships between the public services division units and units of other divisions.

Task Forces worked in the areas of Internal Communication; Organization, Management and Staffing; Technology and Public Services; and User Needs, Service Performance, and the Promotion of Public Services. During the self-study, which included a survey of 1,100 library users, over 200 draft recommendations were suggested: some 66 final recommendations are included in this report.

The report also includes the director's charge and a one-page introduction. The recommendations are arranged according to the following topics: Communication, Committee System in General, Planning and Coordinating Groups, Specific Departments and Areas: Planning and Coordination, Staffing, Staff Development and Training, Public Services Policies, Referrals, Microcomputers, Copying Equipment, Access to the Collection, and Issues for Further Review and Study.

Appendixes (not included in this report, and available separately) cover the Task Force reports.

PREPARED BY OMS STAFF

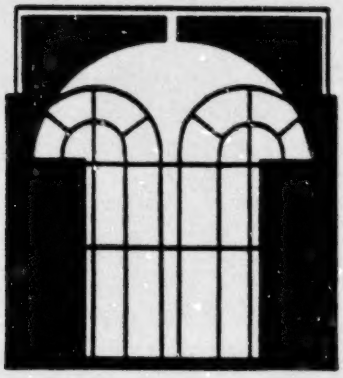
THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

ACADEMIC AFFAIRS LIBRARY

PUBLIC SERVICES IN RESEARCH LIBRARIES

FINAL REPORT OF THE STUDY TEAM

October 1, 1984



Supported by a Grant from the General Electric Foundation
through the Office of Management Studies,
Association of Research Libraries

Contents

ACKNOWLEDGEMENTS....2
PARTICIPANTS....3
CHARGE TO THE STUDY TEAM....4
INTRODUCTION....7
REPORT AND RECOMMENDATIONS
COMMUNICATION....9
COMMITTEE SYSTEM IN GENERAL....11
PLANNING AND COORDINATING GROUPS
TASK FORCE ON THE INTRODUCTION OF BIS....13
PUBLIC SERVICES COMMITTEE....14
COMPUTER SEARCH SERVICES COMMITTEE....16
SPECIFIC DEPARTMENTS AND AREAS: PLANNING AND COORDINATION
BA/SS AND HUMANITIES....18
INTERLIBRARY LOAN....20
MICROFORMS....21
UNDERGRADUATE LIBRARY....21
NONPRINT....22
STAFFING....24
STAFF DEVELOPMENT AND TRAINING....25
PUBLIC SERVICE POLICIES....30
REFERRALS....31
MICROCOMPUTERS....32
COPYING EQUIPMENT
PHOTOCOPIERS....36
MICROCOPIERS....37
ACCESS TO THE COLLECTION....37
ISSUES FOR FURTHER REVIEW AND STUDY....40

~~APPENDIX A: STUDY TEAM INTERIM REPORT, PARTS 1 AND 2~~

APPENDIX B: TASK FORCE REPORTS
INTERNAL COMMUNICATION
ORGANIZATION, MANAGEMENT, AND STAFFING
TECHNOLOGY AND PUBLIC SERVICES
USER NEEDS, SERVICE PERFORMANCE, AND THE PROMOTION OF PUBLIC SERVICES, INCLUDING APPENDICES 1 - 4

AVAILABLE SEPARATELY:
SEE BACK OF TITLE PAGE

Acknowledgments

The members of the Study Team would like to express our grateful appreciation to:

the Office of Management Studies of the Association of Research Libraries and the General Electric Foundation whose support made the Library's participation in this project possible;

Pat Swanson and Shirley Hallblade, OMS Consultants, who guided us through the various stages of this study and offered useful advice and warm encouragement throughout;

Dr. James F. Govan, University Librarian, for his thoughtful interest and support;

the Chairs and members of the four Task Forces whose diligent research and herculean efforts were the basis for this final report;

our departmental colleagues who have filled in for us and have been very understanding and supportive of our part in the overall project;

Marina Harris and Sarah Stubbs, members of the Communications and Staff Development Committees, respectively, who provided us with valuable information during the last phase of the study;

Neily Conrad and Tim Dempsey for their contributions to the Study Team before leaving to take positions elsewhere; and

the many members of the library staff and the University community who consulted with us, helped with our projects, or answered our questionnaires.

THANK YOU ALL!

PARTICIPANTS

STUDY TEAM

Cynthia Adams
Bernice Bergup
Donna Cornick
Gillian Debreczeny
Patricia Buck Dominguez
James Laney
Karen S. Seibert, Chair

TASK FORCES

INTERNAL COMMUNICATION

Rebecca Ballentine
Catherine Elias
Sue Field
Nancy Frazier
Pat Langelier, Chair
Helen Miller
Jane Odom

ORGANIZATION, MANAGEMENT, AND STAFFING

Larry Alford
Janet Flowers, Chair
Carson Holloway
October Ivins
Kathryn Logan
Pattie B. McIntyre
Diantha Pinner

TECHNOLOGY AND PUBLIC SERVICES

Joseph Carroll
Marina Harris
Page Life
Diana McDuffee
Celine Noel
Dana Sally, Chair
Michael Van Fossen
Mitchell Whichard

USER NEEDS, SERVICE PERFORMANCE, AND THE PROMOTION OF PUBLIC SERVICES

Robert Anthony
James Barnett
Sharon Gleim
Pat Heath
Willy Owen
Miriam Sheaves
Diane Strauss, Chair
David Taylor
Nadia Zilper

OMS CONSULTANTS

Patricia K. Swanson
Shirley Hallblade

THE UNIVERSITY OF NORTH CAROLINA
AT
CHAPEL HILL

Office of the University Librarian

The University of North Carolina at Chapel Hill
Davis Library 080-A
Chapel Hill, N.C. 27514

7 July 1983

Dear Study Team Member:

As you know, the Office of Management Studies of the Association of Research Libraries has selected the University Library as one of six in the country for a self-study of public services. The Study Team will be largely in charge of this effort, and I appreciate your willingness to participate and that of your supervisor to allow you to commit the time and energy to it. It will not be an easy task, but I believe it will be a highly valuable one for you personally and for the Library.

This opportunity comes at a difficult yet propitious time. I know you have other major responsibilities, and many of you will have those responsibilities increased when we move into Davis Library. On the other hand, we have a chance to open a truly new era not only by moving into a new facility but by laying the groundwork for services within that facility for the foreseeable future. In light of that challenge, I hope all involved in the project will approach it with as open a mind and as much imagination as possible.

We need to identify the proper balance of the traditional and the new, and we need to prepare for future changes in all aspects of service to the University community. This self-study, funded by the General Electric Foundation, affords an opportunity that we could not have provided from Library resources to stand back and take a systematic look at current and future services. Through it, we should be able to set priorities, increase our knowledge of our users, anticipate needed decisions, expand our problem-solving capacity, identify current developments and emerging opportunities in library service, and raise the community's awareness of that service's value to the University's instructional and research programs. The Study requires a group approach to problem analysis; and working through the Study Team and several task forces in the collection, organization, and interpretation of information in order to develop recommendations, we should gain a far better capacity and organization for continuing guidance of public services in the years ahead.

I know that some feeling has existed that Public Services has not received as much attention as Technical Services in the past few years. That perception arose, in part, from historical fact — the early and significant impact of online cataloging systems. I hope this rare opportunity to undertake a thorough examination of Public Services and to plan the future in that area will help to right the balance in the minds of anyone who has felt that way. But more importantly, I believe that everyone should regard TRLN,

for example, as a library project -- the catalog is principally a tool for users and public services staff -- and most emphatically, everyone should regard the Public Services Study as a library project. It is more than merely symbolic that each project involves members of other Divisions, and I hope that one result of experiencing the self-study will be that we will come more to stress our interdependence, our unity, and to find less importance in the distinctions which are an unfortunate by-product of administrative organization.

The Study Team should consult and communicate as broadly as necessary. Other members of the staff will be interested in your progress, and you should find some means of keeping them informed. You should interview whoever will be helpful to you, and you are free, of course, to consult all pertinent Library files. I hope you will read the relevant library literature, and I hope the experience will prove to be broadening and informative for all concerned. I will consult with you or the task forces whenever you or others in the Study Team find it useful; and by the same token, I would like to be informed of your progress as the Study moves forward. A lot of care and thought went into your selection, and I am very hopeful that you will enjoy the experience and that the Library will realize a fundamental benefit from it.

It is general procedure for the Library Director to indicate some issues to be examined. I hesitate to do that for fear that my suggestions might divert you, who know the situation far more intimately than I, from something more important. I will confine myself to suggesting some broad areas for your initial consideration:

-Effectiveness of Services to Users
-Coordination of Public Services throughout the Library System
-Organizational Changes within the Public Services Division
-Programmatic and Budgetary Priorities
-Working Relationships between Public Service Division Units and Units of Other Divisions

The Study Team should limit the number of task forces to a half dozen or fewer, but under broad headings such as these, each group should be able to investigate specific subjects.

I trust that everyone on the staff is aware of the budgetary constraints that we face now and in the future. It stands to reason that we cannot find solutions to whatever problems we identify by significant increases in expenditures but must rely more on creative use of the resources we have and a clear idea of our priorities. At the same time, we must prepare for that time, whenever it comes, when more funds are available and use those priorities to select the services which should receive first attention.

The Study Team will begin concentrated work in August, following the visit by OMS consultants described below, and will have roughly until December 1 to get its initial tasks completed. By that time, the major issues to be examined and the task forces to conduct the studies of them should be identified. Then, because of the move, we will have an interruption in the process until the move is completed. Assuming that is the case by March 1, I would expect the Team's report and recommendations by September 1.

OMS will send two consultants to assist the Study Team: Ms. Pat Swanson, formerly Head of Reference Service at the University of Chicago Library and recently appointed Head of the Science and Technology Library at Chicago, on leave to assist in this program; and Ms. Shirley Hallblade, Head of the Management Library at Vanderbilt University. They will provide the necessary background materials as well as training which will give explicit guidance in procedures and methodologies. The Team will meet with Ms. Swanson and Ms. Hallblade on August 1st from 9:00 AM to 5:00 PM and on August 2nd from 9:30 AM to noon and 3:00 PM to 4:00 PM in Room 338, Wilson Library. A full staff meeting on the project will be held in Greenlaw Hall 101 on August 2nd from 1:30 PM to 2:30 PM.

Again, I appreciate your willingness to serve, and I hope you share my enthusiasm for this landmark study in the Library's history.

Sincerely yours,

James F. Govan

James F. Govan
University Librarian

kr
cc: Ms. Patricia K. Swanson

INTRODUCTION

With completion of this report, the preparatory phase of the Public Services Study is over. The most exciting part is yet to come: the challenge and opportunity of being involved in the implementation process. Support and participation from all across the Library was evident throughout the past fourteen months and demonstrated vividly the interdependence of library staff and departments. Public services, like TRLN, are the concern of all. Your continued interest and commitment will help turn the accepted recommendations into an agenda for action.

The Study Team began its work, as did the Task Forces, with the initial assumption that library services are outstanding. It is a pleasure to report that the results of the user surveys were overwhelmingly positive: on the average, 96% of the 1,100 respondents were satisfied with the various services and departments. The over 200 draft recommendations prepared by the four Task Forces, then, focused on fine tuning existing services and improving communications, planning and coordination, staff development and training, and the incorporation of new technologies into the Library's operations and services.

Each draft recommendation received careful attention. Not all, however, appear in this Final Report. A number of the recommendations were passed along directly to individual department heads because we felt they were specific enough to be handled at the departmental level. Others expressed valuable concerns that need to be kept in mind, but which required no special action. We viewed several recommendations as unfeasible in relation to the current budget structure and other service priorities. A good number of recommendations have been or are being acted upon; for example, an SPA position for BA/SS has been established; a current microfilm subscription and five-year backfile of the News and Observer are in the process of being acquired; and an OCLC terminal to be shared by the reference departments and Interlibrary Loan is on order.

The recommendations that do appear in this report we consider to be of high priority and, in most cases, represent a distillation and embellishment of the recommendations drafted by the Task Forces. We expect that some of the recommendations will need further discussion, clarification, and possible revision before implementation occurs.

The Final Report is arranged into broad categories, each with a series of relevant recommendations. Quotations and page references from the Task Force Reports and supporting statements from the Study Team accompany the recommendations. Readers are urged to consult the Task Force Reports for more detailed and comprehensive discussions of the issues studied.

With gratitude to the Task Force members, to our other colleagues, and to all members of the University community, we present this report. It is our hope that the work of the study will lead to an even more outstanding public service program within the Academic Affairs Library.

REPORT AND RECOMMENDATIONS

BEST COPY AVAILABLE

COMMUNICATION

Effective communication is the shared responsibility of every staff member, supervisor, and administrator. In an effort to improve both upward and downward communication, the staff must be responsible for communicating their concerns to the administration, and the administration, in turn, should provide prompt and full information regarding staff concerns, such as salary freezes, budgetary matters, and building and equipment problems. Although much of this information is passed on by the Library Administration, there are often breaks in communication at the departmental level. To improve the situation, information needs to be conveyed not only through the Department Heads meeting, but also through more frequent full staff meetings, departmental meetings, newsletters, and memos to be circulated or posted.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 1. Library administrators on all levels encourage appropriate staff input in the decision-making process and respond to staff input whenever possible.

(In the NGT sessions conducted by the Task Force on Internal Communication, four different groups expressed the staff's desire to have more involvement in departmental and library policy-making. Input on administrative decisions directly affecting the staff could be effected either through Library Staff Association representatives or departmental/sectional meetings with library administrators. Responses in the NGT sessions indicated that the staff would like for the administration to be open with general information which is not confidential, assuming that for any particular topic, there is always someone on the staff who would be interested. The Administrative Council makes decisions affecting the staff, which could be communicated through memos or announcements. Also, the staff would like to have more feedback on staff input and follow-up reports on problems and/or complaints. A special problem area mentioned was a lack of information regarding supply requests and repair orders. THE STUDY TEAM; INTERNAL COMMUNICATION, pp. 49-53)

RECOMMENDATION 2. Library administrators and other participants in the Department Heads meeting discuss ways to make their meeting more effective through possible format, content, or structural changes.

(Both the Internal Communication and Organization Task Forces found that while the Department Heads meeting may be an adequate device for relaying information, it is not the best forum for problem solving, due to the large number of people involved. One solution would be for subgroups of the Department Heads to meet so that common problems and issues could be more easily addressed than in the large group meeting. THE STUDY TEAM; INTERNAL COMMUNICATION, pp. 42-43; ORGANIZATION, p. 43)

RECOMMENDATION 3. The Library Administration continue to encourage regular staff meetings in departmental libraries and library departments or sections.

(Both the staff survey and the NGT sessions conducted by the Task Force on Internal Communication elicited requests for regular department meetings and improved departmental communi-

cation. Meetings not only serve as effective vehicles for making announcements, but "they also have a potential for gathering input from the staff and for sharing ideas." THE STUDY TEAM; INTERNAL COMMUNICATION, p. 42)

RECOMMENDATION 4. The effectiveness of full staff meetings be increased by holding meetings more frequently and considering possible format changes.

(As mentioned earlier, the Task Force on Internal Communication found that the library staff is interested in having more involvement with, and receiving more information from, the Library Administration. More frequent staff meetings could be an effective vehicle for receiving information directly from the administration, and the familiarity created by the frequency of the meetings would help to promote a sharing atmosphere. To increase staff involvement in the meetings and to encourage two-way communication, the administration could solicit suggestions for discussion in advance from the staff, and consider circulating a tentative agenda, so that staff are prepared to ask questions or make comments. Soliciting topics from the staff would also allow the administration to receive advance notice of potential questions and to be more aware of staff interests and concerns. THE STUDY TEAM; INTERNAL COMMUNICATION, p. 52)

RECOMMENDATION 5. Staff groups or departments invite top library administrators to meet with them to discuss issues of concern.

(In the staff survey conducted by the Task Force on Internal Communication, "18.6% of the respondents expressed difficulty in communicating with the administration." The survey also "contained requests for more visibility of top administrators and more frequent contact with them, especially in small-group settings." The University Librarian has often offered to meet with library departments or informal groups in meetings or bag lunch gatherings, and these efforts ought to be continued. The staff, however, should share the responsibility for initiating contact. THE STUDY TEAM; INTERNAL COMMUNICATION, p. 52)

RECOMMENDATION 6. The focus of the Interdivisional Forum be re-examined with the purpose of achieving a balance among Technical Services, Public Services, and Special Collections issues.

("Presently, the Interdivisional Forum has lost direction, focus, and, to some degree, effectiveness...Good topics for discussion remain, but the logistics of the Forum do not appear to be working well." ORGANIZATION, pp. 59,62)

RECOMMENDATION 7. The Library Staff Newsletter consider as many of the following as possible in an effort to improve this important communications channel:

* work more closely with Public Services and Special Collections to encourage their input;
* provide more regular information on committees and committee structure, as well as reports and information from committees;
* relay information from the administration or the Administrative

BEST COPY AVAILABLE

Council on issues of general staff concern;

* reschedule the publication date to follow more closely the monthly Department Heads meeting.

(Staff participants in the Internal Communication Task Force's NGT sessions and staff survey indicated that while they like the Library Staff Newsletter as a means of receiving information, they feel that it could benefit from some changes. The Newsletter staff has already begun an evaluation and improvement process, and we encourage them to consider the above points in their deliberations. THE STUDY TEAM; INTERNAL COMMUNICATION, pp. 48-49)

RECOMMENDATION 8. The Communications Committee and the Library Administration continue to refine the Committee's charge and to educate the staff as to the purpose of the Committee.

(Library staff members are not always sure of the proper channels for voicing concerns, so often the Communications Committee is either not utilized or, alternatively, is approached inappropriately. The current effort to clarify the Committee's charge, and subsequent publicity as to the appropriate role of the Committee, will enhance communication within the Library. THE STUDY TEAM; INTERNAL COMMUNICATION, pp.45-46)

COMMITTEE SYSTEM IN GENERAL

Committees should, and often do, serve as important channels for communication within the library system, but comments made in several of the Task Force reports suggest that improvements can be made to make the committee system more productive, and the individual's participation in it, more interesting and time-effective.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 9. The title, purpose, and names of the contact person and members of each administrative committee, subcommittee, and task force be placed on library bulletin boards and published periodically in the Library Staff Newsletter. The Librarians' Association and the Library Staff Association may wish to follow suit for their committees.

("Too many staff members are unaware of the existing communication channels. They don't know whom to approach with their concerns. Publicizing the committee system would alleviate this problem." INTERNAL COMMUNICATION, p. 45)

RECOMMENDATION 10. At an appropriate time each year, an orientation session for new and returning committee chairs and members be organized by the Staff Development Committee in which the importance and usefulness of agendas, minutes, regular meetings, deadlines, resource materials, various group discussion and decision-making techniques, etc. would be covered.

(Time and energy are important commodities to the staff, particularly in light of current work loads. Time wasted in disorganized or unfocused meetings results in frustration and cynicism. Training in effective group techniques, especially for new chairs and committee members, should go a long way toward improving the committee system in general. THE STUDY TEAM)

RECOMMENDATION 11. Committee and task force chairs make a practice of going over the following with new members: the function and charge of the group; the responsibilities of the chair and members; the reporting mechanisms to both the administration and staff; and the duration of the appointment.

(Focusing on the specifics of the individual assignment would complement the general orientation to committee work described in the recommendation above and would give the new member a firm understanding of what was expected of him or her. THE STUDY TEAM)

RECOMMENDATION 12. The Library Administration acknowledge committee reports, inform group members of progress on their recommendations or of decisions made, and formally discharge committees and task forces at the conclusion of their work.

(Staff members sometimes perceive a communications gap upon the completion of a task force or committee assignment. After a report is made to the administration, the task force or committee is not always sure of the outcome of its work or whether its job is complete. THE STUDY TEAM; INTERNAL COMMUNICATION, pp. 44-45)

RECOMMENDATION 13. A system of periodic reviews be established and conducted of each committee and task force, including an evaluation of the charge and progress toward agreed upon goals and objectives.

(Neither the Internal Communication nor Organization Task Forces were charged with or carried out an overall review of the committee structure, but both indicated concerns about it. Recommendations that certain groups or meetings be reinstated, reactivated, reexamined, expanded, or reconstituted suggest that a more timely review of committees and their progress or lack of it would be beneficial. THE STUDY TEAM; ORGANIZATION, pp. 58-62; INTERNAL COMMUNICATION, p. 44)

PLANNING AND COORDINATING GROUPS

The need and desire for participation in increased planning and coordination efforts was a theme that ran throughout most of the Task Force reports, and resulted in recommendations or suggestions for the creation of four new committees and the revamping of five more—each of which had merit in the context of the Task Forces' specific areas of study. At the same time, though, the Task Forces commented on the weight of current work loads, the need for additional staff, and the increased demands for service.

BEST COPY AVAILABLE

The Study Team has attempted to keep the proliferation of committees to a minimum by setting priorities and recommending only those groups which we felt would meet the most critical public service needs. In one case, we are recommending task force status and a short-term charge. In another, three recommended committees have been melded into one. In several others, we have suggested increased responsibility for already existing groups.

Task Force on the Introduction of BIS

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 14. The Library Administration give highest priority to the formation of a Task Force on the Introduction of BIS.

("While there has been some information distributed staff-wide concerning the development of the online catalog (TRLN updates), there has been little or none concerning plans for its implementation. The Task Force discovered among staff in general a rising concern about the dearth of information and formal, organized planning in light of the rapid approach of BIS I and user access this fall." ORGANIZATION, pp. 61-62; TECHNOLOGY, pp. 14-20)

RECOMMENDATION 15. The Task Force on the Introduction of BIS be composed of representatives from Public Services, Technical Services, and the Special Collections.

("We hope that the online catalog will come to be viewed as a library-wide project, a collaborative effort of Technical and Public Services with the TRLN system staff. This will not happen unless we make it happen, through the establishment of responsibility for decision-making, concrete plans, and lines of communication." TECHNOLOGY, p. 20)

RECOMMENDATION 16. The Task Force be charged with planning the public introduction of BIS, which should include addressing the following issues and concerns:

* the placement of public use terminals in the Academic Affairs Library, taking into account the factors offered for consideration by the Technology Task Force on pp. 17-18 of its report;

(This issue was brought up at a meeting of the Davis Department Heads, but no decision was reached. Various locations were suggested, but they need to be investigated more thoroughly before a final determination is made. Since placement of terminals for public use may affect the way that training is provided, it would be appropriate for this Task Force to study the matter. THE STUDY TEAM)

* the question of responsibility for staff and user training;

("UNC-CH especially needs to delineate responsibilities and to decide upon mechanisms to be used in training staff and in evaluating the system. TECHNOLOGY, p. 14; ORGANIZATION, p. 62)

* the transformation of the current Information Desk into a Catalog Information Desk as a mechanism for ongoing patron assistance with both the manual and online catalogs;

  ("In Davis, however, the logistics of increased space and use may require the addition of an information desk closer to the terminal bank." TECHNOLOGY, p. 16)

* a public relations program to inform the University community of BIS and its development;

  ("Patrons and staff must be informed about the who, what, when, and where's related to TRLN and its enhancements." TECHNOLOGY, p. 15)

* possible future directions or potential problem areas yet to be addressed or still needing resolution at the time the Task Force concludes its work on the issues listed above.

  ("Local administration of the online catalog will involve the constant assessment and reevaluation of need..." TECHNOLOGY, p. 15)

Public Services Committee

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 17. The Library Administration reconstitute the Public Services Committee.

("Given the complexities involved and the specialization required in a large research library, the Task Force thinks that tapping the information resources within the staff is absolutely imperative. Therefore, we believe that, despite fears of committee proliferation, this one needs to be reinstated." ORGANIZATION, p. 46)

RECOMMENDATION 18. The Public Services Committee be composed of representatives from BA/SS, Circulation, Humanities, the Undergraduate Library, Special Collections, Collection Development, Serials, the other Technical Services, the Science departmentals, and the non-Science departmentals, with the Associate University Librarian for Public Services as an ex officio member. The Study Team also recommends that the Computer Search Services Committee be represented either in the form of an ex officio member or by dual membership of one person on both committees, and that, for the purposes of staff development, the position of Chair be rotated on a two- to three-year basis.

("The root of the problems identified seems to be a lack of communication and coordination between divisions." ORGANIZATION, p. 56)

RECOMMENDATION 19. The Public Services Committee be involved in recommending public service policies and programs to the Library Administration through the Associate University Librarian for Public Services, who should consult with the appropriate departments regarding implementation. To further coordination and communication, the Chair of the Public Services Committee should be invited to attend monthly meetings of the Public Service Heads.

("It is a generally accepted truism these days that participation in decision-making increases the commitment of staff to proposed changes. Also, in this Library, the staff is of an unusually high caliber and shows considerable dedication in the performance of their duties. For these reasons, the Task Force thinks that every effort should be made to solicit ideas and suggestions for improvement of public services from all levels of staff." ORGANIZATION, p. 46)

RECOMMENDATION 20. In its initial phase, the Public Services Committee be charged with addressing the following specific issues and concerns:

* the development of a new Library Guide or series of individual brochures on departments and services;

  ("One primary need identified by the subgroup is an overall guide or series of brochures to library services and departments, special collections, and departmental libraries." USER NEEDS, p. 67; ORGANIZATION, p. 48; and DEPARTMENT HEADS MEETING, July 17, 1984)

* the Information Desk, its continuance, dissolution, or transformation into a Catalog Information Desk. The Committee will need to work closely with the Task Force on the Introduction of BIS on this matter;

  (Whatever form the Information Desk takes, if it is continued, an important priority should be investigating ways to ensure a more uniform quality in staffing. ORGANIZATION, pp. 77-79)

* the continued development of a program for combatting noise in Davis Library, taking into account related efforts made by the Undergraduate Library staff;

  ("Respondents left little doubt that they are sensitive to library environments...All three groups complained about noise in Davis...Open architecture, concentrated use, and user attitudes all seem to be contributing factors to the perception of noise." USER NEEDS, pp. 51-52)

* the improvement of the public services training and referral processes.

  (See subsequent sections on Staff Development and Training and Referrals for further discussion of this matter. THE STUDY TEAM)

RECOMMENDATION 21. After the preceding issues have been addressed, the Public Services Committee organize itself in an appropriate and effective manner to deal with bibliographic instruction and the promotion of public services in the following ways:

BEST COPY AVAILABLE

* by conducting a careful review of the Library's current bibliographic instruction program, including library tours, to determine whether the Library is offering the appropriate kind and level of services needed in this area and to follow up with recommendations for necessary program changes or additions. User Needs Recommendations 14, 21-26, 51D, and 126 and Organization - Bibliographic Instruction Suggestions 1-3 should be considered;

  ("It appears that a small group to work out reporting techniques, planning, and problems as they develop or overlap would be very beneficial." ORGANIZATION, pp. 21-25)

* and by serving a coordinating role for all aspects of the Library's publicity and promotion program. The group will need to investigate the establishment of a budget for production of publicity materials, so that the expenditure of funds can be monitored to reflect a coordination of needs and a support for priority items. Recommendations presented on pp. 61-69 of the User Needs Task Force report should be considered.

  (Promotion of library services has been identified as an area that needs coordination and direction. In the past, individual departments and services have independently produced brochures, handouts, etc. to promote services, yet there has been very little coordination of effort. Now that services are being provided in the new environment of Davis Library, the time to promote these services more effectively is opportune.

  The user survey underscores the need for improved publicity as users in all three categories: faculty, graduate students, and undergraduates, exhibited a lack of awareness and familiarity with a number of library services. The three other Task Forces also supported the need for an improved publicity program. THE STUDY TEAM)

Computer Search Services Committee

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 22. The Computer Search Services Committee continue to serve as the coordinating unit for online searching in the Academic Affairs Library with responsibility for recommending budgetary and policy making priorities to the Library Administration through the Associate University Librarian for Public Services. As noted previously, communication with the Public Services Committee would be enhanced by some official affiliation with that group.

("The committee framework would provide an avenue for coordination and centralization of policy, procedures, and budgeting functions, yet not sacrifice flexibility, variety of input, or shared ownership in conjunction with autonomy." ORGANIZATION, p. 33)

RECOMMENDATION 23. The position of Chair be rotated on a two- to three-year basis.

(The Study Team agrees with the Organization Task Force that the position of Chair should be rotated, since this represents an important avenue for staff development, but feels strongly that continuity is equally important. Rotating on a two- to three-year basis is a reasonable compromise. THE STUDY TEAM; ORGANIZATION, pp. 30-33)

RECOMMENDATION 24. The Computer Search Services Committee be involved with the following issues and concerns:

* monitoring the progress of current programs and recommending needed changes to the Library Administration;

("...online searching is a relatively new service. It is not surprising that awareness is limited and that there are problems which need to be worked out. However, it is important that problems be identified, various solutions tried, and results monitored. The Computer Search Services Committee, which is already in existence, appears to be the body most capable of advising the administration about initiating changes in service." USER NEEDS, p. 30; ORGANIZATION, p. 30)

* organizing programs of instruction and reports of training;

("Staff feel a need for an expanded training program in general--more courses, for more staff--and for updated training as services and databases change." ORGANIZATION, p. 28)

* promoting search services to the University community, as staff work loads allow;

("...There is also a serious lack of awareness among library users about online services. Fifty-seven percent of undergraduates, 21.8% of graduate students, and 13.4% of faculty are unaware of the service." USER NEEDS, p. 29; ORGANIZATION, p. 30)

* evaluating the need for end-user training;

("Many researchers have expressed interest in conducting their own computer searches on their own microcomputers..., but this trend does not seem to be a threat to the viability of the Academic Affairs search program. However, the prospect of being consultants to a flood of inexperienced do-it-yourself searchers may eventually have implications for the Library." ORGANIZATION, p. 26; TECHNOLOGY, p. 33)

* investigating possible means of institutional support for providing subsidized access to online databases. The Computer Search Services Committee should keep itself apprised of any Library Administrative Board investigations on this and related matters.

("A number of faculty, graduate, and undergraduate respondents were dissatisfied with the fact that the Library provides the service on a partial cost recovery basis. Many dissatisfied users felt that the Library should provide the service without assessing a fee, or alternatively, more heavily subsidize the service." TECHNOLOGY, p. 33; USER NEEDS, pp. 29-30

> "But in this time of limited or fixed monies, on the one hand, and of burgeoning and competing costs, on the other, justification of needs and distribution of funds are all the more important. To what extent can the Library support this service?" ORGANIZATION, p. 29
>
> The Study Team is aware that several reports generated by committees of the Library Administrative Board have advocated free searching, calling on the Library to find some means of support for it, usually in the form of diversions from the already strained materials budget. The Study Team recommends that all possible means of support be investigated, including, but not limited to, research overhead money, laboratory fees presently charged by Arts and Sciences for computer support services, and departmental subsidies in conjunction with subsidies already provided by the Library. THE STUDY TEAM)

SPECIFIC DEPARTMENTS AND AREAS: PLANNING AND COORDINATION

One of the most important components of the charge the Study Team gave to the Task Force on Organization, Management, and Staffing was to study the possible merger of the reference departments in Davis Library. In its deliberations, the Task Force described the two departments, outlined issues and concerns, and considered the advantages and disadvantages of merging them. The Task Force concluded that even though users would probably be better served by a merger, the local situation precluded such a decision. They therefore recommended that the two departments not be merged. The reasons for the Task Force's recommendation are many and complex. Rather than summarizing them here, the Study Team urges readers to consult the Task Force report, pp. 11-20.

The Study Team accepted the Task Force's recommendation against the merger and passed it on to the Library Administration, which decided to begin the search for a permanent Head of Humanities Reference immediately. The Administration has set up a search committee to be responsible for filling the vacancy and has advertized the position. By the time this report is released, the merger question should be well on its way to resolution.

The recommendation not to merge the reference departments engendered another recommendation, which follows, that the two departments focus their attention on the cooperation of staff and the coordination of services. As both the Task Force on Organization, Management, and Staffing and the Study Team discovered in the course of their deliberations, however, cooperation and coordination were central issues not only to the two reference departments in the Davis Library, but to the Public Services Division and, indeed, to the entire Academic Affairs Library.

The Study Team believes that the following recommendations, based on the Task Force reports, will help the staff plan together to solve common problems and to reach common goals. We hope that their implementation will facilitate the continued excellence of library service.

BA/SS and Humanities

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 25. The staffs of BA/SS and Humanities meet on a regular and frequent basis to consider, among other issues, the following topics:

* the development of a written policy on reference services. As a part of the development of that policy, the split of disciplines between the two reference departments should be reviewed. Uniform policies and programs on referrals (especially at the undergraduate level) and bibliographic instruction should be developed and implemented;

* the problems created by the current arrangement of the reference collections. The reference departments may wish to consider the following points: (1) interfiling the collections in call number order and creating a single catalog for the reference departments; (2) rearranging or renumbering ranges; (3) improving systems of room guides, directional signs, maps, and floor plans; and (4) meeting to determine if any remaining difficulties are intrinsic to the organization of the room and not caused by the recent move to Davis;

* the coordination of online searching;

* the services provided, files created and maintained, and automation projects in progress to determine if there is duplication of effort and if those services remain relevant to the needs of the University community;

* a long-term staff exchange to increase the reference departments' understanding of each other's policies and procedures;

* the cross training of students and staff providing reference service so that the staff at one desk are more aware of the services provided at the other;

* the consolidation of clerical processing within the reference departments to see if they could share a clerk or secretary who could be responsible for it.

RECOMMENDATION 26. BA/SS, Humanities, the Undergraduate Library, departmental libraries, where appropriate, and the Library Administration review the existing division of responsibilities for the provision of reference services (including general reference and bibliographic instruction) to determine whether these responsibilities are appropriately assigned and to give high priority to improving the coordination of reference services throughout the Library.

> ("A theme that ran throughout all of the interviews was the need for better coordination among all units of the Library. The Task Force made an effort to assess the kinds and amount of coordination already existing (particularly in the major public service departments) and the staff's desire to expand in this area. There was some enthusiasm for expansion in a number of areas although time constraints and short staffing were given as reasons for not doing more. The Task Force feels that time must somehow be found to address some of these matters in the interest of improving public services.
>
> The obvious benefits of better coordination include the following: less duplication of effort, increased productivity

through shared ideas, more consistent quality of service provided, better use of resources, and clarification of philosophies, goals, and objectives." ORGANIZATION, p. 45)

Interlibrary Loan

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 27. The Head of the Humanities Department, the Interlibrary Loan Librarian, the Circulation Librarian, and the Library Administration continue to explore ways to improve the administrative structure of ILL.

(Since the introduction of online borrowing through the OCLC system, our ILL lending operation has grown tremendously and continues to grow, placing an increasingly heavy burden on an already overburdened staff. In addition, the split location of the ILL offices in Davis Library and the separation of some procedures between Davis and Wilson libraries have resulted in further management difficulties. There are strong indications that the current structure of ILL may not be the most efficient and practical organization for the system. Also, serious consideration needs to be given to what impact TRLN and the wide distribution of our COM Catalog may have on ILL. It seems likely that it will increase demand on the system significantly, and that, if it is unwieldy now, it will become even more so. THE STUDY TEAM; ORGANIZATION, pp. 35-38.)

RECOMMENDATION 28. Interlibrary Loan continue to develop ways of speeding up the borrowing and lending of materials, especially among TRLN libraries.

("Delays in borrowing are not normally under the control of our ILL staff since they already transmit requests as quickly as they can process them and are, therefore, dependent upon the receiving libraries to deliver the material quickly. However, ILL does not have enough staff to follow up on materials not received promptly...All aspects of the reports on ILL activities deal with speeding up of processes. The department anticipates considerable time-saving features with the installation of a Model 300 OCLC terminal." ORGANIZATION, p. 36; USER NEEDS, p. 34)

RECOMMENDATION 29. Interlibrary Loan review its policy of quotas on outstanding requests as soon as possible, taking into consideration fair and equal access to its services; cooperative collection development programs, especially where responsibility for selecting materials from the publishing output of major portions of the world is assigned to only one library in the Research Triangle; the use of OCLC for borrowing; and its staffing situation.

("Currently, six requests from one individual may be outstanding at any one time. A number of comments suggested that this limit be raised or eliminated...The quota for borrowers...are designed to cut down the workload for interlibrary loan staff. It seems apparent that dissatisfaction with service is not aimed at the interlibrary loan staff, but at the staff they do not have." USER NEEDS, p. 34)

RECOMMENDATION 30. Interlibrary Loan publicize the advantages of the Academic Affairs Library's inter-library policies and give reasons, such as financial constraints, slowness on the part of the lending institution, or the requirements of national ILL codes, for misunderstandings which might arise during use of its services.

> ("If the library is unable to add staff to interlibrary loans...it can only work harder at explaining to the public the problems that it has and seek the public's cooperation and understanding." USER NEEDS, p. 34)

Microforms

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 31. The Microforms Collection continue its organizational relationship with BA/SS, but its staff strengthen their ties with the Serials and Humanities Departments and the Undergraduate Library in order to improve the referrals from other public service desks to microforms resources. A contact person from each of the other public services departments should be appointed to help in channeling information about microforms between the Microforms Collection and the departments.

> ("Because of the relative obscurity of microforms and the size of the Microforms operation, the Collection is not well known in the Library and may not receive the use and referrals that it deserves. Since the Collection has been attached to the BA/SS Department, the referrals from that department have improved. Part of the problems with referrals are caused by misunderstanding the microforms call numbers, which are accession numbers and unlike other numbering systems in the Library. Staff outside the department tend to interpret any microform citation as being held in the Microforms Collection." ORGANIZATION, pp. 39-40)

RECOMMENDATION 32. The Microforms Collection staff make an effort to acquaint public service staff with microforms policies and organization by updating the brochure it sends to public services staff.

> ("The Microforms Collection remains somewhat separated from the rest of the Public Services Departments in Davis because of the location on the second floor, and because of the small staff and operation." ORGANIZATION, p. 40)

The Undergraduate Library

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 33. The Undergraduate Library begin a long-range planning effort to determine where it wants to be in five to ten years. Among other issues, it should address the following concerns:

* the identification of program goals and the establishment of priorities. These goals and priorities would include an evaluation of the services offered, such as reserves and reference services;

("Among undergraduates, two points of dissatisfaction were identified: term paper consultations and help finding periodicals. Undergraduate comments do not explain the dissatisfaction with term paper consultations." USER NEEDS, p. 27

"The reserve reading services are heavily used. For undergraduates, it has the highest rate of use of any of the services, departments, and departmental libraries listed, and is heavily used by all respondents... There is a relatively high rate of dissatisfaction with reserves, which indicates a need for improvement." USER NEEDS, p. 33)

* the issue of staffing needs;

(While no Task Force addressed itself to staffing in the Undergraduate Library, the Study Team identified it as a problem in the course of its deliberations and thought that such a long-term study as the one proposed here would be the proper place to address it. THE STUDY TEAM)

* the Nonprint section and its burgeoning role in the Undergraduate Library;

(Even though the next recommendation involves a long-term planning project within the Nonprint section, the Study Team thought that its importance as a service within the total spectrum of services offered by the Undergraduate Library should also be addressed. THE STUDY TEAM)

* the physical facilities of the Library. User Needs Recommendations 41, 99, 100, and 101 should be considered in any such study.

("The Undergraduate Library is used by all three groups [faculty, graduate students, and undergraduate students], particularly for reserve services..[Users] proposed reallocation of space in UL...to provide better for the wide varieties of activities and functions the library accommodates...There were a number of varied negative reactions to the Undergraduate Library physical facility itself. The poor condition of the physical accoutrements, including the carpet, furniture, lighting, and space allocation problems was prominent. The space needs that appeared to be paramount to users related to an expanded, better equipped non-print collection, photocopying needs, and...specially designated areas, for quiet and group study." USER NEEDS, p. 54)

Nonprint

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 34. Given the uniqueness of the services it provides within the Academic Affairs Library system and the likelihood of its continued growth over the next several years, the Nonprint section develop its own long-range planning document. Among other issues, it should consider the following areas:

* its equipment needs, taking into account the users' desire for more video resources and equipment;

("Video resources are far more heavily used than audio resources, and most of the comments made by our respondents focused on problems with video equipment and materials. Although use is moderate, there exists above-average dissatisfaction with the services and facilities of the Nonprint section among its users, and again, most of this dissatisfaction relates specifically to the video component of Nonprint." USER NEEDS, p. 35)

* its policies for access to nonprint materials, particularly queuing policies;

(From information the User Needs Task Force derived from its questionnaire, it is clear that there is a growing conflict between students who are taking certain courses which now give them precedence in the use of the Nonprint collection for both class assignments and recreation, and those who are not taking the courses and who use it for recreational purposes alone: "Students enrolled in specific courses have priority on the use of all video resources--both equipment and collections. Students not enrolled in thse courses see themselves as 'second-class' users in Nonprint, and they are extremely dissatisfied with the current policy. Part of this dissatisfaction, no doubt, stems from a lack of student awareness of the reasons for this policy." THE STUDY TEAM; USER NEEDS, p. 36)

* a more active publicity program which should address the following points:

  * the availability of subject access to the collection through prepared bibliographies;

("Several respondents indicated that they would use the collection more if the process of locating appropriate materials were simpler and less time-consuming. Subject access through conventional Library of Congress subject headings in a card catalog is not, in the faculty's view, the most efficient way for them to locate materials for class use. Rather, many respondents desire subject bibliographies of nonprint materials relating to their area of interest and spoke as if such bibliographies were non-existent or inadequate. Thus, more publicity or bibliographic instruction seems in order." USER NEEDS, p. 36)

  * the relationship of the Nonprint section to the Media Center and the particular responsibilities of each;

("...Faculty are often unclear about the distinction between Nonprint and the Media and Instruction Center in Abernethy Hall. It is possible that some of the faculty's dissatisfaction can be attributed to the policies and procedures of the Media Center and not to those of Nonprint. As the Media Center is to be housed in the renovated Wilson Library, this confusion is likely to increase unless the library takes action to advertise and clarify its administrative relation to the Media Center." USER NEEDS, p. 35)

* the availability of equipment and services;

  ("The most important issue is demand for access to non-print materials greatly exceeding the present capacity. There were frequent requests for more equipment, space for viewing, and material in the collection. Clearly, an expansion of services is warranted from the users' point of view." USER NEEDS, p. 36)

* a better explanation of policies and the rationale for them.

  ("More publicity about policies, procedures, and resources is needed to allow for more efficient and effective use of existing resources. The library has made a significant commitment to providing nonprint materials for the research and recreational needs of its users and it should continue to support that commitment by ensuring fair and easy access to the resources it holds and by continuing to expand its collection, services, and physical facilities." USER NEEDS, p. 37)

STAFFING

While neither the Study Team nor any of the Task Forces carried out a systematic review of personnel requirements during the course of the study, the need for increased staff was a prominent theme throughout the Task Force reports, as was a common concern about current staff work loads. The User Needs group stressed that:

> The general need for increased staff is evidenced by statistical use patterns in the existing statistics and is indicated by users' experiences of delays in service, user complaints, and unprocessed material. This Task Force did not study staff needs in depth and cannot make recommendations on staffing increases. We can say, however, that by our reading of user comments and use patterns, the survey supports requests for more staff at many service points and in the library technical services. (User Needs, p. 59)

The Task Force on Internal Communication, on the other hand, focused on the specific need for an additional staff member in the Operations Office. The Technology Task Force reinforced the need for a Systems Librarian and emphasized the impending introduction of the online catalog and its potential impact on staffing, particularly in terms of providing patron assistance. Finally, the Organization Task Force, recognizing the current difficulty in obtaining new positions, put forward a single recommendation for increased staff: a professional or paraprofessional for BA/SS. Fortunately, the Library has been able to use enrollment change funds to create the recommended position in BA/SS. The Task Force also noted, though, that "in the public services staff interviews, a need for additional staff was mentioned by nearly every department."

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 35. The Library Administration undertake a system-wide review of staffing needs to determine how best to allocate personnel resources in the future.

RECOMMENDATION 36. The Library Administration address ways that temporary staff could be hired to help Public Services departments during seasonal peak periods of October and November and March until May.

> ("A more serious problem shared by all service points is the seasonal nature of reference requests. In October and November and again in late March until May, many students are preparing papers and projects...this is... their busiest time...A number of staff members mentioned that qualified temporary help would be a great asset during peak times." ORGANIZATION, p. 73)

RECOMMENDATION 37. Departments be given authority to provide merit pay increases to student assistants and to pay higher student wages for more complex functions. The Library Personnel Officer should work with department heads to implement student pay schedules in each department that maintain equity in student pay throughout the Library, while rewarding experience, meritorious performance and specialized skills.

> ("The quality of service in all library departments is highly dependent on student workers. The lack of merit pay increases and the lack of rewards for specialized skills is perceived as a problem in recruiting good student workers...a great deal of staff time is spent in all departments training student assistants. If student turnover can be reduced, a significant amount of staff time could be saved." ORGANIZATION, p. 71)

STAFF DEVELOPMENT AND TRAINING

Staff development and training is an issue which was included directly and by inference in the reports of all four Task Forces. The Study Team, in synthesizing these reports, sensed the staff's belief that a strong development program is not a fringe benefit, but a means of attaining high goals and standards of service, efficiency, and job satisfaction.

While increases in knowledge and improvements in expertise may naturally be incorporated into normal work activities, others must be sought outside of the ordinary course of duties. To expand staff members' knowledge beyond the sphere of their own specific tasks and departments is essential in public services. Training is needed which emphasizes that the provision of information often involves a thorough knowledge of the materials and services of other departments in the main library, other libraries on campus, and the broad scope of academic services within the University.

There are considerable resources for training and education available in the Library and in the University at large, often free of charge. Many go unidentified and untapped, however, because there is a lack of a coordinated, overall effort to seek them out and to see that the staff, as a whole, is provided with a means of access. Many fine development sessions are provided by the Library Staff Association, the Librarians' Association, the Staff Development Committee and other library committees, individual departments, and groups in the University, but forceful central planning is needed to provide a cogent systemization of efforts, to seek practical avenues of training, and to identify unmet training needs. The Staff Development Committee, which has done excellent work within the limitations of its authority, could serve this purpose admirably if the scope of its responsibilities were broadened.

Finally, all departments may not systematically provide training which staff and student assistants need as a basic foundation for job activities. It is the responsibility of individual departments to work assiduously to ensure that training for all members of the department is as well-planned and as thorough as possible.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 38. The Library Administration redefine the responsibilities of the Staff Development Committee to include the coordination of current staff development programs and the identification, creation, and presentation of new programs. In addition, the Administration should consider the following:

* that the committee be appointed by the University Librarian to ensure representation from a range of departments and divisions, with guidelines to maintain an appropriate SPA/EPA balance in the membership, and with consideration for maintaining communication mechanisms with the Library Staff Association and the Librarians' Association; and
* that the committee be supported by a modest operating budget.

("One of the most appreciated means of support to a staff that is continually being asked to accept additional functions is for the administration to support a strong staff development program. Such a program should conduct training as well as convey information about staffing issues. The Staff Development Committee invites speakers but does not conduct training." ORGANIZATION, p. 74

If the Staff Development Committee is to represent the staff adequately, its membership must reflect a variety of professional levels, as well as a range of work interests. Appointment of this committee would allow for these factors to be considered in determining its composition. Two members currently serve as liaisons to the Library Staff Association and the Librarians' Association. The Administration should consider if this is the most efficient means of effecting communication be-

tween these groups. Financial support for the committee would enable it occasionally to purchase training materials and to use paid speakers, and would emphasize that the Administration recognizes the importance of staff development. Finally, it is suggested that any changes which are proposed should be developed in consultation with the present Staff Development Committee. THE STUDY TEAM)

RECOMMENDATION 39. The Staff Development Committee be charged with developing and coordinating an effective orientation program for new staff members and continuing to arrange and develop further a program of periodic workshops and more informal open houses for all staff as ongoing orientation to sections, departments, and departmental libraries.

("In the NGT sessions...16% of the participants suggested open houses or problem-solving sessions that cross departmental lines as a means of improving communications throughout the system...A better understanding of operations in other parts of the system is important in knowing how each person's work will affect another's...In the NGT sessions... ideas that were generated concerned interdependency of separate jobs and the need to know how ones work affects others...In response to Question #7 on the survey ('Do you have any other comments you'd like to make?') 7.4% of the respondents commented on the value of orientation and tours given by various departments, and there were requests to increase the number of programs or tours of departments and departmental libraries." INTERNAL COMMUNICATION, pp. 43, 47-48)

RECOMMENDATION 40. The Staff Development Committee consider the following topics for presentation as staff development and awareness programs:

* training for supervisors in communication skills and in supervisory techniques, such as selection, hiring, delegation of duties, evaluation, and disciplinary procedures;

("Question #4 on the Survey of Library Communication, ('Anything else?') 13.5% of the respondents expressed the need for improved inter- and intra-departmental communication...10.8% of those responding to this particular question commented on the need for communication and the effort needed to make it work, along with the observation that 'supervisors are made, not born.'" INTERNAL COMMUNICATION, pp. 47-48; ORGANIZATION, p. 74)

* work skills and training of value to all staff members. Topics might include time management tips, effective patron interaction techniques, how to maintain poise under pressure, training to improve committee effectiveness of members and chairs, and specific library functions, such as filing rules, conducted by Catalog Maintenance, and referrals, discussed by staff from the reference departments.

("While the library's clientele was quick to point out staff strengths, it was equally quick to point out weaknesses. Respondents mentioned that there are times when the staff seems uninterested, abrupt, rude, and unhelpful." USER NEEDS, p. 58

Improvement in work skills and knowledge about functions of the Library can aid staff members in performing more effectively and confidently. Formal programs can provide information and training which may not be available in the normal course of a person's work, or is available only in a fragmented fashion. Training for committees, which was discussed in an earlier recommendation, can greatly aid in making committee participation a productive part of an individual's work sphere, and in making committees a vital aspect of the overall work of the Library. THE STUDY TEAM)

RECOMMENDATION 41. The Library Administration encourage department heads and committees with interdepartmental representation to consider, as part of their on-going activities, the arrangement of problem-solving sessions between departments and sections to inform one another about and to improve procedures which are of mutual interest.

(The need for better coordination of many specific policies, procedures, and services through better communication between individuals and departments involved is a theme of concern in all of the Task Force reports. In many instances, the need is seen for discussion on a more ad hoc or particularly focused level than is possible in broadly representative bodies, such as the Department Heads. Some specific problems which might be dealt with in this way are: referrrals; procedural coordination between BA/SS and Humanities; better communication between service points, Acquisitions, and Cataloging in dealing with the backlog; and training issues. There are many others which could be currently identified, as well as those certain to arise in the future. THE STUDY TEAM)

RECOMMENDATION 42. The Library Administration, department heads, and committees, whose jurisdiction includes training issues, encourage joint training for common needs. In particular, groups such as the reconstituted Public Services Committee, the Staff Development Committee, the Task Force on the Introduction of BIS, and the Committee on Technological Priorities should consider training as one of the issues which they study in an effort to provide better coordination and standardization of training activities and to decrease unnecessary duplication of training efforts among departments.

("The training is spread among the departments, which is appropriate since each staff member is assigned to a single job and department. The different departments place emphasis on different aspects of training and many different levels of involvement are reported. This uneven training reflects that lack of coordination and the fact that the goals of training are different among departments." ORGANIZATION, p. 52

The Study Team has identified many areas in which coordination of training efforts would improve services, save staff time, and ensure that staff members have access to necessary training.

The issue of the introduction of the online catalog is a major one, involving procedures which must, of necessity, be shared effectively between divisions. Problems and needs developing from the use of microcomputers in the Library, for example, must be addressed more effectively in the near future, if this equipment is to be utilized to its fullest advantage. Referrals are another area in which joint training is valuable, and doubtless there are others. THE STUDY TEAM)

RECOMMENDATION 43. Each department with a public service desk maintain a systematic program of training for all staff and student assistants, which should impart not only factual knowledge necessary to working effectively in the department, but also an awareness of the broader goals and policies of public services.

("Because of the dispersed nature of training by the separate departments, some departments seem to be more effective than others in achieving basic competencies on the part of new or student staff at public service desks. A general lack of standardization among the department's training programs exists in the Library...UL and Circulation use a checklist to accomplish this task; BA/SS and Humanities use formal instructional sessions as well as procedure manuals. Both methods seem effective, but departments should examine the methods used by other departments..." ORGANIZATION, p. 51-52

"Users also noticed uneven quality of reference service between full-time staff and student assistants." USER NEEDS, p. 58

"The use of so much student labor at the public service desk require that permanent staff do a careful job of training students and that they supervise, monitor, and advise students while the students are working at the desks." ORGANIZATION, p. 52)

RECOMMENDATION 44. The University Librarian make available to all professional staff members information on the Library Administration's expectations relating to professional activities and research, beyond departmental activities, so that staff have criteria to use when making judgments about the desirability of various commitments.

("Concerns about this centered around three main issues: 1) the time taken away from the service desks by extracurricular activities such as committee meetings, 2) the varied level of activities among staff members, and 3) the connection between professional activities versus job performance in determining salary increases." ORGANIZATION, p. 65)

PUBLIC SERVICE POLICIES

The existance of well-defined public service policies makes it easier for members of each department to understand the services expected of their own department and those which are provided by others. On a more subjective, but extremely important, level, these policies can have a considerable and beneficial effect on the attitudes which staff members and student assistants bring to their work, to the work and staff of other departments, and to their interactions with patrons. Policies help to promote more efficient and fulfilling collaborative efforts between departments and to ensure that the provision of services is carried out harmoniously at all levels. They can exercise a positive benefit in encouraging excellence and in providing a means of aiding in its achievement. On the other hand, the absence of clearly stated public service policies, or the misunderstanding of established ones, can cause difficulties within and between departments.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 45. The Associate University Librarian for Public Services, in consultation with the Public Services Committee and the Public Service Department Heads, work to see that all departments providing public service develop a formal set of policies about which all members of a department, including student assistants, are thoroughly knowledgeable. In addition, existing policies should be reviewed to ensure the currency of their provisions. Departments should exchange and coordinate policies, so that members of one department will be familiar with the policies of others.

> ("...the policies and resulting attitudes which the departments operate under are varied and often not understood by other departments...The lack of understanding of the service policies has caused some problems in referrals...These sorts of problems and even the perceptions of departments are probably caused in some cases by a lack of information on the policies of departments other than their own." ORGANIZATION, p. 49
>
> Policies need to be developed for the broad scope of a department's activities and for particular functions, such as tours, bibliographic instruction, and services for graduates and/or undergraduates, which may be shared between departments. Consistency should be an important factor to be considered in developing policies. THE STUDY TEAM)

REFERRALS

The issue of referrals is somewhat paradoxical in that, while referrals are a single, very specific aspect of public service work, they make some of the broadest, most complex demands on the knowledge of staff members. Because of the complexity of our campus library system, care in making referrals is of great importance to the provision of excellent reference service. Those who work at public service desks must be able to field questions, not only about the materials and services of their own departments, but also about the wide variety of collections and services in other locations. An incorrect referral embarrasses the department by which it is made, aggravates the department to which a patron is sent erroneously, and frustrates the patron, whose time is wasted. Problems in making correct referrals are not limited to one or two departments, but have been identified across the board. For this reason, all departments which staff a public service desk must concentrate on improving performance in this area.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 46. The Public Services Committee develop guidelines and aids for referrals which will help departments to improve the quality of referrals.

> (Several suggestions were made by the Organization Task Force, including the development of a standard referral slip, the establishment of a policy that no referral be made to a departmental library without calling to ascertain if the referral is correct, and the development of an in-house guide to library services. THE STUDY TEAM; ORGANIZATION, p. 55)

RECOMMENDATION 47. BA/SS, Humanities, Circulation, Serials, the Undergraduate Library, Special Collections, and the departmental libraries work together and through the Public Services Committee to alleviate problems caused by poor referrals, and the departments make an effort to arrange training about other departments, for both staff and student assistants, when referrals are a problem.

> ("To the user there is no wrong place to go; the place to go is to a nearby desk if a sign has not directed him elsewhere. It is the responsibility of the library staff to provide... well-informed referrals...Every department with public service points including departmental libraries in general, was mentioned as having student assistants, and sometimes staff, who give poor referrals." ORGANIZATION, pp. 54-55

> Many specific problems were pinpointed by the Organization Task Force. They included incorrect referrals to another department, especially for materials which are actually held in the referring department; inappropriate referrals of lower level undergraduates to the main library; incorrect referrals to departmental libraries; and non-reference staff trying to answer reference questions. THE STUDY TEAM; ORGANIZATION, pp.54-55)

RECOMMENDATION 48. Departments using student assistants at public service desks stress that if there is the least doubt about where information or material is located, the patron should be sent to a reference department. If the student is in one of the reference departments, he or she should consult with a full-time staff member before making a referral or should call the department to which the patron is being referred to ascertain if the referral is correct.

> ("Every department in the library system seems to have some difficulty in training student assistants adequately for correct referrals. Hours during which full staff members are not on duty are the times when most problems arise...Referrals by student assistants to departmental libraries without consulting more experienced staff members causes frustration of users when it is an incorrect referral." ORGANIZATION, p. 54)

MICROCOMPUTERS

During the course of the Public Services Study, the Library acquired five IBM Personal Computers, in addition to the two Apple microcomputers already in place. As of this writing, machines are being used, in some cases on a shared basis, in the following departments: BA/SS, Humanities, Collection Development and Acquisitions, Cataloging and Serials, Special Collections, and the Undergraduate Library. Part of the effort of acquiring these microcomputers was accomplished by the Task Force on Microcomputers, which was appointed to explore available hardware and software and to poll departments about possible projects and microcomputer applications.

After the arrival of the microcomputers, the Committee on Technological Priorities was established by the Library Administration to provide a channel for staff input into decisions on non-IRLN and non-OCLC related expenditures for hardware, software, telecommunications, upgrades, and enhancements. Requests for these items will be submitted to the Committee, which will then make recommendations to the Library Administration. The Committee is also charged with undertaking the following:

> The Committee will attempt to establish a mechanism for staying informed about activities in the area of automation throughout the Library system in order to minimize duplication and to permit communication between two or more staff members who are interested in similar or related projects. In addition, the Committee will try to alert staff members to workshops, vendors' demonstrations, etc., on campus, so that the staff can take advantage of any necessary training opportunity. Staff members who are engaged in automated activities should inform a member of the Committee of their projects and interests and of any training opportunity that comes to their attention. (Memorandum to Department Heads from the University Librarian, August 21, 1984)

While the Committee is empowered to engage in coordinating efforts, it does not have the authority to develop training programs or guidelines for the use of equipment or software.

As a September, 1984 article in the Library Staff Newsletter illustrates, microcomputers are now being used in the Library for a wide variety of applications. The staff has embraced this technology with eagerness, but also with some trepidation and frustration. Training in the use of a microcomputer

and in particular types of software can be an extremely demanding and time-consuming process, and some staff members have felt hampered by lack of training and by limited access to a PC. Most departments have devised some sort of scheme for training, but there is no overall coordinated program to encourage consistent efforts in training, to devise improved methods, or to prevent unnecessary duplication in initial training activities.

At the university level, there are exciting developments, as well, in the implementation of microcomputers and the encouragement of computer literacy for faculty and students. These represent both an opportunity and a challenge for the library staff. The increasingly wide-spread availability of microcomputers on campus has resulted in an increase in training sessions offered by various units of the University in which library staff members can participate. At the same time, the many microcomputer activities on campus make library staff feel under pressure to gain expertise, not only for the enhancement of their own work, but also so that the Library will be viewed as keeping pace with the technological growth of the community in which it operates. As our patrons become more knowledgeable about microcomputers, so must the library staff. The recent placement of clusters of microcomputers in Davis and the Undergraduate Library as a part of Dean Graves' course development project, along with the growing interest of faculty in learning to perform their own computer searches via microcomputers, exacerbates this need. The microcomputer is not just a tool to facilitate our own work, it is increasingly viewed by our patrons as a library resource for which we are expected to have developed expertise.

The Library has made an excellent beginning in the implementation of microcomputers. Despite problems which occur, there is no doubt that the library staff is eager to become expert in the use of this technology and to use it as productively as possible. If we are to take full advantage of this valuable and powerful equipment, however, more effectively coordinated programs for training and for the use of equipment and software will need to be devised.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 49. Where need is demonstrated, each library department or subunit have its own microcomputer or microcomputers.

> ("...one readily apparent, immediate problem is two or more units sharing microcomputers. Library units have identified so many microcomputer needs that each department would need access to its own machine all day. Departments sharing microcomputers currently have time periods allotted to them each day, but this arrangement will prevent them from creating files that would need continuous access." TECHNOLOGY, p. 23)

RECOMMENDATION 50. In addition to encouraging in-house training and the use of free training available on campus, the Library Administration make funding available for other training when appropriate and establish a central channel for administering it.

> ("Commercial training workshops may cost several hundred dollars per person, but one or two staff members who are trained by vendors could return and train the rest of the staff." TECHNOLOGY, p. 24
>
> Funds have been made available in the past for some staff members to attend computer camps, and it seems likely that this type of training as well as other development activities, such as attendance at meetings, updates, and workshops, will continue

to be viewed as useful. This has certainly been true in the case of online searching, where attendance at national meetings has been a valuable way of keeping up with new equipment, search techniques, and services. Attendance at sessions of this sort often requires both travel funding and a registration fee. If money is going to be available for training, then all staff members should have the opportunity to apply for it through a clearly defined system for requests. THE STUDY TEAM)

RECOMMENDATION 51. Until a Systems Librarian position is available to handle further microcomputer planning, the jurisdiction of the Committee on Technological Priorities be broadened to enable it to function more effectively in aiding the Library Administration in implementing this technology. The Committee should be assigned responsibility for the following:

* coordinating existing programs of training and developing new ones when needs are identified, and administering any funding which is available for training;

  (This Committee already is partially empowered to work in the area of training, by acting as a clearinghouse for information on training available on campus and on microcomputer projects and activities in the Library. The group could greatly expand the usefulness of this activity, if it functioned as an overall coordinator of training activities. The Committee could work with departments, other committees, such as the Staff Development Committee, and with the staff associations to see that the training needs of the staff are effectively met, and that unnecessary duplication of training efforts does not occur. In addition, it could develop training programs or sessions for needs which are not being met by other activities in the Library or on the campus.

  In keeping alert to training opportunities available outside of the Library, the Committee could focus partly on identifying training for which funding would be necessary, and could aid the Library Administration in managing a budget for this purpose. In doing this, it could perform a function similar to that of the Computer Search Services Committee. THE STUDY TEAM)

* developing guidelines for the sharing of software and equipment;

  ("Departments must currently share certain software packages for word processing, database management and accounting functions. This has already become a time-consuming logistical problem. Since most software is not in the public domain, copying would perhaps involve unpleasant legal ramifications." TECHNOLOGY, p. 23

  Because of financial constraints, it is probable that not all units needing the use of a microcomputer will be able to acquire one. This may be a particularly acute problem for departmental libraries which cannot acquire one through their academic departments. Guidelines for the sharing of equipment would ensure that all units would have some opportunities for access. THE STUDY TEAM)

* encouraging the formation of an in-house microcomputer users group;

  ("Microcomputer user groups have sprung up on many levels. There is currently a group here on campus that meets to discuss the IBM PC. These groups are an excellent way for users to share problems and find out how others have found solutions to these problems. Microcomputer users can gain useful knowledege that is not readily available either in manuals or tutorials." TECHNOLOGY, p. 24

  This would be a relatively simple effort to get underway. If this Committee did not wish to pursue it, a suggestion could be made to one of the other staff committees or organizations that this would be a worthy development activity to pursue. THE STUDY TEAM)

* seeking contact with individuals with sophisticated expertise who could aid the Library in implementing this technology effectively;

  (There are now staff members in the Library, as well as many persons on campus, who are highly skilled in this area and who would be willing to offer advice and information. It would be extremely valuable for all staff members using a microcomputer, if there were a central gathering point for information on people who would be willing to be contacted when needs arise. THE STUDY TEAM)

* working to keep the library staff informed on campus-wide developments for microcomputers and their implementation.

  (There are growing pressures on library staff to be aware of what is occuring on campus in this area. A broadband cable system has been partially installed which will make campus-wide networking possible, for example, and the library staff should be aware of this and other capabilities which may become available. In addition, the placement of microcomputers for student use in the Undergraduate Library will inevitably lead to demands on the staff for information about them. THE STUDY TEAM)

RECOMMENDATION 52. All levels of staff having job responsibilities which would be facilitated by the use of a microcomputer be provided with the necessary training.

("...student assistants with significant experience may be available to library departments. While some departments are already using such students, all departments should be aware of this potentially valuable resource." TECHNOLOGY, p. 23

All levels of staff should be considered eligible for training. No staff member should be excluded from the use of a microcomputer because he or she is of a particular job level. THE STUDY TEAM)

RECOMMENDATION 53. Ample supplies for microcomputers, such as paper, ribbons, and diskettes, always be available in the Library's supply room, and channels be established for obtaining service when equipment malfunctions.

(There is nothing more frustrating for staff members than being unable to use a necessary piece of equipment because it is not functioning properly. It is all the more frustrating if the problem is simply that a supply item is unavailable. As we become more dependent on our micros, it becomes increasingly important that they are always ready to run. The problem of maintenance will become more acute as new machines are added. THE STUDY TEAM)

RECOMMENDATION 54. Careful consideration be given to building security and the protection of valuable equipment, software, and data.

(As more computer equipment becomes available for use by the public, the public will become more aware of the existence of microcomputers in the Library. Staff members may have a tendency to assume incorrectly that equipment in the office areas is safe. THE STUDY TEAM)

COPYING EQUIPMENT

Photocopiers

The most frequent complaint by faculty, graduate students, and undergraduates responding to the User Needs survey concerned the number and location of photocopiers, particularly in Davis Library.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 55. Continue placement of a photocopier on each floor in Davis Library, and place additional machines at a central copying location. If this is not feasible, consider placement of photocopiers on alternate floors and place the other machines in a central location, along with the change machine.

RECOMMENDATION 56. The Library Administration urge University Printing and Duplicating to place photocopiers in departmental libraries that lack them. In particular, Brauer Library, which serves five departments, seems to merit consideration.

RECOMMENDATION 57. As a first step, the Library Administration investigate the cost, reliability, staff satisfaction, and maintenance arrangements of vendacard copying in the Health Sciences Library, followed by a special meeting or meetings with the appropriate University Printing and Duplicating officials to discuss vendacard use, the allocation of copiers in departmental libraries, and other related matters.

("Respondents also expressed dissatisfaction with the quality of copies produced, the current location of the change machine in Davis, and the frequent malfunctioning of equipment. A number of users expressed their preference for the photocopying facilities at the Health Sciences Library ...In particular, many users like Health Sciences' vendacard pay system." USER NEEDS, p. 48

"...the degree of patron frustration with photocopying facilities justifies a request for more and better equipment. Additional machines in Davis would remove one of the major complaints about that facility...Departmental libraries that have no photocopy machine stand the risk of increased theft and mutilation of materials." USER NEEDS, p. 49)

Microcopiers

The User Needs Task Force reported that approximately one quarter of each library user group surveyed reported making copies of microformat materials, and a number of them were dissatisfied with the service.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 58. The Library Administration acquire a second film/fiche copier for the Davis Library Microforms Collection to meet the demands for copies during peak user times and to serve as a backup when the current machine is awaiting repair. Purchase of a film/fiche machine for the Undergraduate Library should also be considered. The possibility of receiving a free microfiche/film copier with the purchase of large microfilm sets should be investigated.

RECOMMENDATION 59. Include microcopier equipment in a regularly scheduled maintenance program for all microforms equipment and maintain an inventory of frequently needed spare parts to eliminate delays in basic equipment repairs. At present, replacement parts are ordered on an "as needed" basis from the supplier, a process that may take up to two weeks. In those instances when a needed part is not available and must be ordered, the Microforms staff should post a sign which indicates not only that the equipment is out of order, but also that the repair will be delayed until the part arrives from the supplier.

RECOMMENDATION 60. The Library Administration investigate the adapatability of current microcopiers to vendacard or autotron pay systems.

> ("Almost all the comments about copying from microformats were negative. Users objected to the quality, legibility, and the cost of copies. They also complained that there are too few microcopiers during peak periods of use and that the machines are often broken for extended periods of time." USER NEEDS, p. 49)

ACCESS TO THE COLLECTION

The issues involved in access to the collection all arise from the idea that the Library has a responsibility not only to collect materials, but also to make access to them logical and convenient for patrons. Anything which causes a patron difficulty in discovering what exists in our collections and in obtaining it for use is a problem in access. One patron may find the Library's hours inconvenient; another doesn't find a book listed in the card catalog, but it is here, in the cataloging backlog; another needs to use a North Carolina newspaper, but the North Carolina Collection is closed; another is confused by a shelving arrangement; another needs to browse through the entire run of a journal which is housed in Wilson Library. In any of these situations, the patron feels that he cannot get to the materials needed.

Numerous recommendations were made by the User Needs and Organization Task Forces which reflect problems in access to the collection. Many of these have been or are being acted upon; for example, the following:

* Put a sign on top of each section of the Davis Library card catalog and a sign in each serials fiche notebook indicating that reference staff should be consulted if the user fails to locate the title sought;
* Publicize the fact that users may browse in the documents stacks;
* Place a microfilm subscription for one or two major North Carolina newspapers for the Undergraduate or Davis Library, with a three to five year backfile;
* Davis Library department heads should consider user demand for keeping Davis Library open longer hours.

A recommendation that BA/SS and Humanities should examine ways of making the arrangement of the reference area less confusing is included in an earlier section of this report, as are a number of other access-related recommendations. A few recommendations were considered by the Study Team to be unfeasible and alternatives were accepted. It did not seem practical, for example, to file copies of book order cards in the public catalog; but it is hoped that signs on the catalog directing patrons to the reference departments will alleviate the problem of materials in the backlog and, in addition, help alleviate problems for patrons who for numerous reasons may not find something in the card catalog.

One specific area of concern which was identified by the Task Forces is the problem of materials housed in Wilson Library, both in the Special Collections and in the storage area for Davis Library. The Special Collections have always had limited hours, which have led to particular difficulties in the case of North Carolina newspapers. Before the move of the main library collections and departments to Davis Library, the North Carolina Collection maintained some weekend hours in addition to 8:00AM to 5:00PM on weekdays, and would leave microfilm in the Circulation Department for use at night. After the move, a procedure was established whereby microfilm would be left in the Circulation Department for use on weekends only. The planned acquisition of a microfilm subscription and a five-year backfile of the News and Observer for Davis Library should be a tremendous boon to patrons, but the heavy use of other North Carolina newspapers on microfilm and of the more retrospective parts of the News and Observer urges a reconsideration of the current policy.

The storage collection in Wilson is made available to patrons by the Circulation Department through a paging system. This is a practical approach to the current situation, while Wilson Library is under renovation. It is likely, however, that this system will become increasingly costly, time-consuming, and cumbersome as more and more materials are housed in Wilson in years to come. In addition, there have been some problems when patrons, particularly out-of-town visitors, have not been able to have materials paged on weekends.

The Study Team realizes that these are notably vexing problems and not easily solved, but we believe that any improvements will be greatly appreciated by patrons and staff alike.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 61. The current procedure whereby newspapers on microfilm in the North Carolina Collection are placed in the Davis Library Circulation Department for use on weekends be extended to weeknights. This procedure should be continued permanently for microfilm not duplicated in the Davis Library, unless the North Carolina Collection is able to maintain some weeknight hours after the renovation of Wilson Library.

("...the belief that the unavailability of North Carolina newspapers at nights and on weekends is a serious public service problem is widely held throughout the departments that provide public service." ORGANIZATION, p. 63

"Undergraduate students mostly complained that the lack of evening and weekend hours of the North Carolina Collection limits access to North Carolina newspapers. Microfilm editions of North Carolina newspapers are unavailable on weeknights and are available during weekends only if advance arrangements are made. Since many undergraduates do research at the last minute, it is not surprising that they are frustrated." USER NEEDS, p. 46)

RECOMMENDATION 62. The Circulation Department provide adequate paging service on weekends for materials located in the storage areas of Wilson Library.

RECOMMENDATION 63. After the Library Administration has established policy guidelines, channels be publicized for making requests for reclassification and transfer of materials from Wilson to Davis Library.

RECOMMENDATION 64. After the renovation of Wilson Library is completed, the Library Administration give high priority in personnel planning to providing for circulation of materials from Wilson Library. At the least, hours should be established when the stacks are open for browsing.

("Many faculty and graduate students are highly displeased that they do not have immediate access to [books in Wilson Library].

Graduate students were particularly outspoken on this subject, and some suggested that all books be reclassified and transferred...to Davis...over two-thirds of the faculty and more than half the graduate students customarily browse in the stacks." USER NEEDS, p. 45

It seems logical to assume that the paging system will become less and less cost effective in coming years, and increasingly frustrating to patrons. A circulation staff for Wilson was planned at one time, but financial exigency caused abandonment of the idea. Even if it is a very long-term goal, obtaining adequate staffing for this purpose should be a priority. THE STUDY TEAM)

ISSUES FOR FURTHER REVIEW AND STUDY

The major difference between contemporary libraries and those operating in the next decades will be the degree to which technology is used in traditional library functions, and traditional library services are expanded by technology. Because the technological revolution began so recently and changes occur so frequently, libraries--indeed, most organizations--have tended to react to the new technologies, rather than planning for their implementation in a systematic way. Because the ongoing nature of technological change makes it difficult to find definitive solutions to technological issues, it is imperative that an organizational structure be set up to monitor new developments.

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 65. Until a Systems Librarian is appointed who could develop long-range planning for the Academic Affairs Library, the Library Administration charge the Planning Committee or the Committee on Technological Priorities with monitoring appropriate technologies, weighing the relative merits of each, and setting priorities among them. Among other issues, the following need to be addressed:

* the purchase of data files on magnetic tape that have archival value;

  (While the IRSS data library on campus has purchased and made available social science data files on magnetic tape, the need for machine-readable data centers for the other disciplines on campus has not been addressed. The Library will need to be involved in any campus attempt to meet these needs. THE STUDY TEAM; TECHNOLOGY, pp. 31-32.)

* videodisk and optical disk technologies;

  (The Library should investigate these new technologies further to determine the kinds of uses it might make of them. See pages 9 and 34-38 of the Technology Task Force Report for a more complete discussion. THE STUDY TEAM)

* the Library's place in a campus-wide information network.

  (The Technology Task Force considered this one of the most important it addressed in its deliberations and recommended that the Library work with campus officials to define responsibilities. THE STUDY TEAM; TECHNOLOGY, p.3)

RECOMMENDATION 66. The Library send individuals to conferences and workshops on developing technologies, whenever appropriate and possible.

(It is extremely difficult to learn from the library literature how the new technologies are being adapted for library use. In addition, few libraries have the expertise and funding to experiment with appropriate new technologies on their own. Conferences and workshops are almost the only way to learn not only about what may be possible for a library to do, but what is actually under way. THE STUDY TEAM; TECHNOLOGY, pp. 6-9)